

A 3(16) Fiduciary Services Proposal for ABC Company

Enhanced 3(16) Product

- Sign and file Form 5500
- Review Compliance Tests
- Review Contribution Calculations
- Review Census Data for reasonableness
- Plan audit support – up to two hours
- Interpret Plan Provisions as an independent fiduciary
- Review and approve Qualified Domestic Relations Orders (QDROs)
- Review and approve non-automated participant loans
- Review and approve non-automated participant hardship distributions
- Review and approve non-automated participant distributions

Please refer to the terms of the service agreement for full details.

Enhanced 3(16) Program Features

- Fiduciary Warranty – Pentegra's promise to you
- Fiduciary Document Vault – Online document storage
- Fiduciary Scorecard – Annual fiduciary duties checklist

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Pricing: \$2,000 per year plus \$5 per participant.

